

Zambia Social Science Journal

Volume 4

Number 2 *Volume 4, Number 2 (November 2013)*

Article 5

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Recommended Citation

Stawasz, Andrew and Talbot, Thaddeus (2013) "The Power of Politics for Zambia's Public Sector Unions: A Case Study of the 2013 Nursing Strikes," *Zambia Social Science Journal*: Vol. 4 : No. 2 , Article 5.

Available at: <http://scholarship.law.cornell.edu/zssj/vol4/iss2/5>

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The Power of Politics for Zambia's Public Sector Unions: A Case Study of the 2013 Nursing Strikes

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Recent pay reform efforts in Zambia have sought to generate more competitive wages and benefits for workers in the public sector. However, these efforts have been characterised by inconsistent policy decisions during wage negotiations. Such decisions produce distortions in the pay structure that result in industrial unrest from unions in the public sector. Previous literature has not examined how public sector unions influence these outcomes in Zambia. This article examines factors that affect public sector unions' influence in Zambia. Seven factors were identified after analysing the 2013 wage negotiations and subsequent nurses' strikes at the University Teaching Hospital (UTH) as an extended case study. Most variables decreased union influence. Outcomes that favour unions were found to be largely the result of the government's political will. Therefore, political will was determined to be the strongest variable influencing outcomes, whether to the benefit or detriment of unions and their members.

Introduction

Efforts at Zambian civil service pay reform have attracted a considerable amount of controversy in recent years. Civil servants, who are characterised by some as being overpaid, received a 200% wage increase in 2013 (Mukanga, 2013). Still, there has been a high rate of industrial unrest from civil servants, as evidenced by all ten public sector unions declaring a dispute with government in 2014¹. At the centre of this controversy stand the unions, which represent public sector workers. Since negotiations and industrial unrest are often linked to unions, one needs to examine their influence during negotiations and in subsequent conflict to understand this seeming paradox of substantial wage increases and labour unrest.

These trends were illustrated in a case study spanning the 2013 public sector wage negotiations, where many civil servants were granted considerable wage increments, and the subsequent nursing strikes at the University Teaching Hospital (UTH) in Lusaka. By using this case study to theorise about variables that give unions influence, this article argues that public sector unions in Zambia are not influential for a multitude of reasons, and that many of the outcomes commonly attributed to unions are actually the result of the government's political will. While the unions representing civil servants who received the largest salary increments clearly benefited from the government's political will, those representing nurses lost relative standing, and were therefore harmed by the government's political will to the point of industrial unrest. This resolves the apparent paradox by revealing that when the government's interests are in line with unions', as with those who were granted large increments, union-friendly outcomes occur, but when they conflict, as with nurses' unions, outcomes are more harmful.

This article is organised into five sections. The Literature Review places this analysis in context by demonstrating the need for a systematic look at exactly what variables give public sector unions influence. The Methodology outlines how the 2013 wage negotiations and subsequent UTH strike were chosen as an extended case study and how interviews were conducted to learn more about it. The Background presents a relevant historical overview of public sector unions and a chronology of events related to our case study to illustrate what happened in 2013. The

¹ 'Strike Watch', 2014.

Results discusses what variables the study found that affect union influence. The Discussion analyses these findings to show that unions do not wield much power, then summarises and concludes the argument.

Background

Historical Trajectory of Public Sector Unions in Zambia's Third Republic

To understand the state of Zambian unions today, a brief history of the Zambian labour movement is useful. At Zambia's independence in 1964, its labour movement was one of the strongest in the region, but it has since lost considerable power, especially after the Movement for Multiparty Democracy assumed office in 1991. Symptomatic of this weakening is the fragmentation that has plagued the Zambian labour movement since then. In 1994, the Federation of Free Trade Unions in Zambia was formed to rival the Zambian Congress of Trade Unions, which was formerly the only union federation, and many splinter unions emerged (Fashoyin, 2008; Mulenga, 2011). As more rival unions surfaced, bargaining power of the unions relative to the government declined. This trend of diminishing union power also exists in the public sector.

Frustrations with worker pay and benefits have made the civil service a hotbed for industrial unrest. Admittedly, these strikes are often illegal (Fashoyin, 2008; Mulenga, 2011). But, as Fashoyin notes, '...in Zambia, colossal impediments are placed on the right of workers to strike', making it practically impossible to engage in a legal strike in many cases where grievances are time-sensitive (Fashoyin, 2007, p. 2). Public sector health workers in particular have had a long history of striking (see, Leenstra, 2012). The government's usual reaction to these strikes is characterised as 'a messy combination of appeasement and repression', where strikers are fired, sometimes with police involvement, but are later reinstated, sometimes with the government conceding workers' demands, which sends mixed signals (Leenstra, 2012, p. 190).

Before the Strikes

One major issue with pay reform in Zambia's civil service is the use of *ad hoc* and piecemeal policies by the government to rationalise pay structures. Instead of stabilizing annual pay levels for most jobs, government officials agreed to offer significant allowances to a few industries that eventually caused an inflated wage bill and formed incongruities between jobs' content and their pay (Valentine, 2002). To solve this problem, the government introduced the Job Evaluation and Re-Grading (JERG) exercise. This exercise would identify the appropriate pay for each job in the public sector. However, the JERG exercise was largely unsuccessful because of poor implementation².

Decisions from some government leaders conflicted with the desired outcomes of pay reform efforts and offset the goals of the JERG exercise. During election seasons, for example, it is common for government officials to offer union leaders higher wages and allowances than anticipated by the Ministry of Finance in order to gain favour for re-election. Overly generous offers inevitably expand the wage bill and undercut the JERG's purpose. At the same time, these promises force the Ministry to cut programs in order to find supplemental funds. Thus, the wage negotiations following the JERG exercise inflated the wage bill (Kabamba, 2013), and indicated that political motivations can go beyond only recommending austerity measures³.

² Consultant for the JERG exercise, interview, June 2014.

³ Representative of the Ministry of Finance #2, interview, June 2014.

In April of 2012, unions in the health sector began the process of wage negotiations by collecting a list of demands from their members. These demands were then delivered to government representatives before the negotiations. Union leaders were all invited to a resort in Siavonga that was paid for by the government to negotiate⁴.

Health unions representing professionals, like nurses, demanded an across-the board wage increase for their members⁵. While the government agreed to provide a 100-200% wage increase for non-professional workers in the health sector, they would not grant a similar increment to the nurses. This was because of the favourable increment nurses received in 2012. The government's efforts to harmonise wages in an effort to eliminate large gaps in the pay structure meant that the lower paid workers, including non-professional health workers, were given significantly larger increments than professionals, who were already earning much more⁶. Nurses were given a 4% wage increase coupled with a 17% total increase to allowances (GRZ and CSAWUZ, 2013). Once the agreements were signed in April and May, unions informed their members of the negotiations' outcomes⁷. Many nurses responded with surprise, as they had expected more⁸.

October Strike

In September 2013, while they were supposed to get a 4% increment on their basic salary, some nurses' payslips amounted to only 1.1%. Health Minister Kasonde claimed this was merely as a result of payroll errors⁹. However, this was not enough to assuage nurses, who began their first strike on or about the 2 October¹⁰. In addition to the payroll issue, nurses cited the issue of being paid similar wages as less-educated non-professionals. Operations at UTH were severely hurt by the strike¹¹. Both government and union representatives implored the nurses to return to work¹². On the 9 October, some nurses did return after their union convinced them to¹³.

Political players were deeply involved. Hakainde Hichilema, the leader of the opposition party United Party for National Development, wrote to President Michael Sata siding with the striking nurses¹⁴. Sata responded by accusing Hichilema of politicising the issue and even calling him a 'Merchant of death'¹⁵, revealing the degree of opposition to the strike from the ruling party. Meanwhile, on or about the 10 October, when Health Minister Joseph Kasonde tried to meet with strikers, they refused to meet with him¹⁶. Around that same time, Kasonde threatened to charge striking nurses with absenteeism, calling the strike illegal¹⁷. When Minister of Labour Fackson Shamenda visited strikers and viewed one nurse's payslip, he appeared surprised at

⁴ Representative of Zambia National Union of Health and Allied Workers, interview, July 2014.

⁵ Representative of National Union of Public Service Workers, interview, July 2014.

⁶ Neo Simutanyi, interview, July 2014; Union representative, interview, July 2014; Expert on Zambian labour relations, interview, July 2014; Representative of Zambia Union of Nurses Organisation #1, interview, July 2014; Representative of National Union of Public Service Workers, interview, July 2014; Representative of Health Workers Union of Zambia, interview, July 2014.

⁷ Representative of Zambia Union of Nurses Organisation #1, interview, July 2014; Representative of Zambia National Union of Health and Allied Workers, interview, July 2014.

⁸ Former UTH nurse #1, interview, July 2014; Former UTH nurse #2, interview, July 2014.

⁹ 'Nurses Feel Cheated', 2013.

¹⁰ 'Nurses and Midwives', 2013.

¹¹ 'UTH Paralysed', 2013.

¹² 'Government Working', 2013.

¹³ 'Nurses Call', 2013.

¹⁴ 'HH Writes', 2013.

¹⁵ 'President Sata Attacks', 2013, para. 1.

¹⁶ 'UTH Nurses Refuse', 2013.

¹⁷ 'Nurses to be Charged', 2013.

how little they were being paid and promised to make the changes they were demanding¹⁸. Union representatives also met with strikers to assure them they would address their grievances if they called off the strike. Soon after these meetings, all nurses returned to work¹⁹.

November Strike

The second nurses' strike began on the 22 November following the government's failure to rectify the issues Shamenda promised to address²⁰. In addition to the issues carried over from previous strike, some nurses demanded a 100% salary increment²¹. This strike further hurt operations at UTH²². In addition to the government, union officials also pushed nurses to return to work to promote smoother negotiations with government²³. Immediately after they began striking, nurses demanded to meet with Minister Shamenda²⁴, but he refused²⁵. He later met with union representatives, telling them that the strike is illegal and that nurses can be fired²⁶.

The government gave an ultimatum on the 28 November that workers had to report by 17:00 or they would be charged with unexcused absences²⁷, but nurses refused to cooperate²⁸. When they were issued exculpatory letters, nurses even refused to collect them²⁹, suggesting strong animosity between nurses and the government. By December, some UTH nurses had returned to work³⁰. But by the 2 December, 100 UTH nurses had been dismissed. This crippled operations to the point that the main UTH operating theatre had been forced to close³¹. By the next week, 234 nurses had been fired nationwide³². In all, 570 nurses were fired³³. In the interim, an estimated 250 nurses were allowed to reapply as new employees, an unprecedented outcome in Zambia.³⁴ Nurses were only fully reinstated in December 2014, about a year afterward³⁵. This further hurt operations at UTH in the meantime³⁶.

These issues continued to be politicised by opposition political parties. Representatives from both the United Party for National Development and the Movement for Multiparty Democracy

¹⁸ Representative of UTH Department of Surgery, interview, June 2014; Union representative, interview, July 2014; Former UTH nurse #1, interview, July 2014; Former UTH nurse #2, interview, July 2014.

¹⁹ Two representatives of Civil Servants and Allied Workers Union of Zambia, interview, July 2014; Former UTH nurse #1, interview, July 2014; Former UTH nurse #2, interview, July 2014.

²⁰ 'UTH Nurses Strike Again', 2013.

²¹ 'Strike by Nurses', 2013.

²² 'Nurses Strike Continues', 2013.

²³ 'Union Wants', 2013; Representative of Zambia Union of Nurses Organisation #1, interview, July 2014; Two representatives of Civil Servants and Allied Workers Union of Zambia, interview, July 2014.

²⁴ 'Strike by Nurses', 2013.

²⁵ 'Nurses Strike Continues', 2013.

²⁶ 'Nurses' Strike is Illegal', 2013.

²⁷ 'Government Gives Nurses', 2013.

²⁸ 'Nurses Defy Government's Threats', 2013.

²⁹ 'Striking UTH, Livingstone Nurses', 2013.

³⁰ 'Some Nurses at UTH', 2013.

³¹ 'Over 100 Nurses', 2013.

³² 'More UTH Nurses Fired', 2013.

³³ 'Re-instating Fired Nurses', 2014.

³⁴ Former World Bank expert, interview, June 2014.

³⁵ 'Re-instating Fired Nurses', 2014.

³⁶ Representative of the University of Zambia School of Medicine, interview, June 2014; Representative of the UTH Department of Surgery, interview, June 2014; Representative of the UTH Department of Medicine, interview, June 2014.

rallied around fired nurses³⁷. Despite this, the government held strong for a long time that they would not reinstate fired nurses³⁸.

Civil Service Pay Reform Efforts in Zambia

The Zambian civil service is in need of pay reform. Valentine argued for the need of more systematic pay reform as opposed to the *ad hoc* and piecemeal approaches that had come before and left many distortions in the civil service pay structure, where similarly qualified workers received different salaries. Without substantive pay reform, the government would continue to struggle to attract, retain, and motivate quality personnel, and would cause deviant work behaviours, such as leaving the workplace during work hours to engage in other income-supplementing activities and corruption (Valentine, 2002).

Valentine (2002) also argued for reform to correct an inflated public sector wage bill. Historically, civil servants have received substantial concessions from government (see, Kiragu and Mukandala, 2003). This has negative implications for Zambia's economic standing. The Public Service Management Division, or PSMD, (2009) notes, 'Given the current wage bill-to-domestic revenue ratio, Zambia has already approaching [*sic*] the upper limits of prudent wage bill growth' (p. 2). As this takes away from Zambia's financial capacity, the International Monetary Fund (IMF) and World Bank have long recommended against the Zambian government granting large wage increases to public servants, as they had been doing (Kiragu and Mukandala, 2003). Efforts to enact reform to address all of these issues, which entail limiting salary increases, are ongoing (See, e.g., PSMD, 2009; PSMD, 2012; GRZ, 2012).

Historically, pay reform efforts in Zambia have not come easily. Kiragu and Mukandala (2003) note, 'The process of pay reform in Zambia has been overshadowed by policy reversals, slowness, hesitancy and at times inaction' (p. 188). The public service unions that have historically won large gains for members are cited as one big reason for this inefficiency. Kiragu and Mukandala (2002) also observe, 'Zambia fits the general observation that the more organised and militant the trade unions are, the stronger the influence of 'politics' in the pay reform process' (p. 204), where 'politics', as used in this context, are a large factor hampering reform efforts³⁹. The apparent tradeoff between public sector union influence and pay reform success is also embodied in Fashoyin's (2008) discussion of efforts to improve public service efficiency between 1997 and 2000 when he calls these efforts' effects 'destabilizing' for unions, as they limited unions' abilities to obtain large gains for members (p. 3). Current efforts are similarly aimed at improving efficiency, and therefore have the potential to come into conflict with unions' claims to power (see, e.g., PSMD, 2009; PSMD, 2012; GRZ, 2012).

However, some scholars posit that union-employer relationships need not be adversarial, and that allowing unions more power may in some instances actually help realise the interests of the employing class (see, Wright, 2000). Regardless of whether the relationship is adversarial or not, it is clear that unions and public sector reform efforts affect one another. Therefore, it is important to understand unions' influence to fully understand dynamics surrounding public service reform efforts. However, no systematic study has looked at such variables for Zambian public sector unions. That is the void that this study looks to fill.

³⁷ 'Reinstate the Nurses', 2013; 'President Sata Should Visit', 2013.

³⁸ 'Government Will Not Reinstate', 2013.

³⁹ As one reviewer pointed out, it would be a mistake to assert that hampering reform involves politics while implementing reform is apolitical. This definition of 'politics' as hampering reform presents the connotation used by Kiragu and Mukandala, but should not be generalised to believe that implementing reform is not itself inherently political.

Methodology

The object of this report is to determine variables that affect union influence in the public sector in Zambia. In order to carry out this analysis, a useful working definition of union influence had to be determined. Edwards (1978), who speaks of union influence as union power, observes that 'power has several dimensions or faces and it would be futile to attempt to encapsulate these complex processes in one operational measure' (p. 1). Therefore, she argues, an indicator of power or influence that is amenable to measurement should be used, even if it is not all-encompassing. Given a largely qualitative study, as with this report, these measurements may not be fully quantified.

McDonald and Suen (1992), in their efforts to measure union power, present an economically-focused definition of union power as 'the ability of the trade union to divide up to its advantage the rents arising from the production process given other parameters' (p. 209). In the public sector, this could be translated to influencing the allocation of government revenue so that union members get a larger share in the form of pay and benefits. While this study was largely qualitative, moments when unions influenced pay and benefits were still apparent within the case study.

However, while influencing resources allocated to members' pay and benefits is undoubtedly important, this limited definition ignores other important ways unions may be influential, even when they are not directly affecting the allocation of resources to pay and benefits. Unions' influence may manifest itself in a number of other ways, both formally and informally, that are important when considering issues in the Zambian civil service. To limit the focus to a manageable number of verifiable factors, this study defines union influence as a union's ability to effect tangible changes in the interests of its members. The major tangible changes identified in this study include gaining higher pay and benefits for its members and protecting members from unemployment.

To determine variables that affect union influence, a case study was utilised, which involved negotiations for the public service collective agreement enacted in September 2013, the subsequent strikes at the government-run UTH, and their after-effects. This case study was chosen because it gives a clear illustration of the ability of unions to effect change for members, and involves a clear portrayal of the apparent paradox outlined earlier. Unions seemed to 'win' during the negotiations but still saw the industrial unrest characterised by the strikes. The findings were then used to theorise about variables that affect union influence in Zambia's public sector.

To learn about this case study, various online sources were consulted, including the *Lusaka Times* and *Zambian Economist*, to generate a basic timeline of events. To gain further insight, a total of 21 semi-structured interviews were held with academics, political analysts, and representatives from the Zambian government, various union leaders, doctors at UTH, and former UTH nurses. Questions were open-ended and dealt mainly with determining what occurred during these case studies and why alternative courses of action were not taken. Trends that emerged from these interviews were identified and used to theorise about variables affecting union influence. Of course, the trends identified are based on respondents' perceptions, which may not always fully reflect reality. But even understanding how others perceive union influence can provide valuable insights regarding where this influence comes from.

Results

The following variables represent themes found across multiple interviews that seem to affect union influence. Most of these variables, including union splintering, relative information and preparedness, communication, finances, the law, courts, and norms, and external players, all worked to lower union influence. The political will of the government, however, was found to either increase or decrease union influence, making it a major determinant of outcomes for unions. When political will was aligned with unions' desires, union-friendly outcomes were seen, but when they conflicted, outcomes were more detrimental to unions. Each of these variables is discussed here in greater depth from the perspectives of different parties.

Union Splintering

Union representatives consistently indicated the importance of union splintering in lowering their influence. Acting in congruence during wage negotiations optimises unions' influence; as such congruence can have the psychological effect of making union demands appear stronger, thereby increasing government concessions⁴⁰. This can also increase the likelihood that each union benefits similarly from negotiations. However, this congruence is disrupted by the bargaining structure, which requires that unions negotiate with government representatives separately. For example, while Zambia's three health unions bargain as one unit, that unit bargains separately from non-health unions at times, reducing how harmonised unions' demands are and weakening their stances⁴¹. If some unions are especially successful in negotiations, then there is less for the other unions to gain, incentivising this competition for government's finite resources when bargaining separately, as each union wants to achieve the best outcomes for its members⁴². This led to at least one union accepting the 2013 agreement, which benefited its members considerably, even though it was known to be at the expense of other civil service unions' members⁴³.

We found that, for unions, the bargaining structure creating a ceiling for government concessions is problematic. Although they bargain as a joint team⁴⁴, bargaining outcomes are significantly diminished as concessions made by some unions set precedents for others. For example, the Civil Servants and Allied Workers Union of Zambia (CSAWUZ) represents workers across various industries, including health. Since the CSAWUZ is the first to sign an agreement, if they accept a mediocre agreement, the government is unwilling to grant other health unions better outcomes, creating a ceiling for these unions⁴⁵. Some therefore signed the 2013 agreement only reluctantly⁴⁶.

Moreover, this trend of union splintering is so pervasive that some even go so far as to claim that unions are created by the government to mitigate the demands of other unions⁴⁷. This

⁴⁰ Union representative, interview, July 2014; Representative of Zambia Union of Nurses Organisation #1, interview, July 2014.

⁴¹ Union representative, interview, July 2014; Representative of Zambia Union of Nurses Organisation #1, interview, July 2014; Representative of Zambia National Union of Health and Allied Workers, interview, July 2014.

⁴² Two representatives of Civil Servants and Allied Workers Union of Zambia, interview, July 2014.

⁴³ Representative of National Union of Public Service Workers, interview, July 2014.

⁴⁴ Neo Simutanyi, interview, July 2014.

⁴⁵ Representative of Zambia Union of Nurses Organisation #1, interview, July 2014; Two representatives of Civil Servants and Allied Workers Union of Zambia, interview, July 2014.

⁴⁶ Representative of Zambia National Union of Health and Allied Workers, interview, July 2014; Representative of Health Workers Union of Zambia, interview, July 2014.

⁴⁷ Two representatives of Civil Servants and Allied Workers Union of Zambia, interview, July 2014.

occurs during times of industrial unrest when the government promotes emerging union leaders to administrative positions in newly formed unions to serve as echoing chambers for the government's opinions⁴⁸. According to the Industrial and Labour Relations Act, only 100 members are required to register a union⁴⁹, making it easy for the government to proliferate these unions. As the presence of more government-friendly unions increase, demands at the bargaining table become less aggressive. This results in further decentralising the labour movement.

The politicisation of union membership is another component of union splintering that reduces union influence. When the 2013 Collective Agreement was released and it was discovered that professional health staff were displeased, some representatives from health unions were quick to blame others. In doing so, they hoped to attract members to their union from the blamed unions⁵⁰. This politicisation continued even during the strikes at UTH. While all health unions publicly condemned the illegal strikes, some union representatives allegedly justified the strikes in private discussions with workers⁵¹. Thus, some unions may support a strike even if they are unable to protect workers from unemployment so that they might attract members by appearing to be on their side. This undermines the clarity of the message communicated to workers, which makes unions' attempts to protect workers by condemning the strike less effective.

Relative Information and Preparedness

Unions and government officials showed that the relative information and preparedness of unions and the government also hurts union influence. According to one union leader, unions generally have a limited access to and understanding of national economic information than the government. When the government provides an economic explanation for their decisions, some unions are unable to respond, which hurts their arguments because they do not address the alleged economic constraints faced by the government. Although unions have researchers tasked with preparing the union to understand and rebut economic arguments, their efforts are often in vain. This union leader even claimed that union researchers are researchers in name alone⁵². The government, on the other hand, has the Ministry of Finance on its bargaining team specifically focusing on discussing economic and financial constraints⁵³. Moreover, outside organisations such as the World Bank are dedicated to equipping the government with financial information to take into negotiations so they are less susceptible to union pressure⁵⁴. This information imbalance means the government can make claims that unions have difficulty countering, leading to the government possibly even fabricating facts at times to affect outcomes, which the unions would have difficulty detecting⁵⁵. This lowers what unions are able to effectively demand.

⁴⁸ Ibid. Also see Mulenga, 2011 for a discussion of powerful labour leaders being co-opted into government positions, a similar tactic that further divides the labour movement.

⁴⁹ University of Zambia labour law expert, interview, July 2014

⁵⁰ Representative of Zambia Union of Nurses Organisation #1, interview, July 2014; Representative of Zambia Union of Nurses Organisation #2, interview, July 2014.

⁵¹ Union representative, interview, July 2014; Representative of Zambia Union of Nurses Organisation #1, interview, July 2014; Representative of Zambia Union of Nurses Organisation #2, interview, July 2014.

⁵² Representative of Zambia National Union of Health and Allied Workers, interview, July 2014.

⁵³ Representative of the Ministry of Finance #1, interview, June 2014; Representative of the Ministry of Finance #2, interview, June 2014.

⁵⁴ Representative of the World Bank, interview, June 2014.

⁵⁵ Representative of Zambia National Union of Health and Allied Workers, interview, July 2014.

Having information is not enough to effectively bargain. There is also a need for practice. Before negotiations, the government coordinates a series of mock bargaining sessions involving different ministries. This mock bargaining involved several meetings where the Ministry of Finance presents a sample budget and is challenged to test their ability to respond⁵⁶. These practices ensure that the government is aware of and is ready to respond to possible union challenges. Without similar preparedness, it becomes increasingly difficult for unions to obtain higher wages and benefits. One union leader noted that if the International Labour Organisation provided training and technical assistance to public sector unions, labour leaders would feel more prepared during negotiations and there would perhaps be more labour-friendly outcomes. However, this does not occur⁵⁷, so unions are left without the international support government receives. Public sector unions have been criticised as being ineffective in bargaining⁵⁸, and these factors surely play into that characterisation.

Communication

Unions noted that miscommunication between the government and workers can inflate worker expectations beyond the unions' ability to meet them, leading to a lack of faith in unions and a lack of an ability for the union to control members. To appear generous to its workers, the government announced that wages had been increased by 100-200% for public servants following the signing of the 2013 Collective Agreements without clearly explaining that the highest increments were concentrated among non-professionals. The announcement led nurses to believe that they were also receiving a large increment⁵⁹. These targeted raises were part of efforts to pay all civil servants a living wage, which necessitated larger increases for the poorest-paid⁶⁰. The fact that nurses only received a 4% wage increase created resentment because they were expecting much higher salary increments. This contributed to their motivation to strike against unions' wills⁶¹. This strike without unions' support hurt unions' influence because it diminished their ability to protect members from unemployment when the government fired the nurses. It was hard for unions to prevent the illegal strike, which would have prevented the government from firing the workers.

Nurses especially showed that miscommunication from unions for political reasons can also play a role in decreasing trust. Once the negotiations ended in April, union representatives travelled throughout the country to explain the outcomes to the worker⁶². Some representatives told their members that they received a 21% increment without explaining that this entailed a 4% wage increase and 17% total increases in allowances in order to make the bargaining outcomes sound more impressive. In October, nurses were surprised to find that they only received a 4% wage increment on their pay slips, as they were expecting a 21% wage increase⁶³. Some nurses had not heard the breakdown of the 21% increment until a meeting with their union the day before the October strike started to clarify the wage differentials. This was an

⁵⁶ Representative of the Ministry of Finance #2, interview, June 2014.

⁵⁷ Representative of Zambia National Union of Health and Allied Workers, interview, July 2014.

⁵⁸ Former UTH nurse #1, interview, July 2014; Former UTH nurse #2, interview, July 2014; see also: Mboosi, 2014.

⁵⁹ Consultant to the JERG exercise, interview, June 2014; Union representative, interview, July 2014; Former UTH nurse #1, interview, July 2014; Former UTH nurse #2, interview, July 2014.

⁶⁰ Representative of the World Bank, interview, June 2014; Union representative, interview, July 2014; Expert on Zambian labour relations, interview, July 2014; Representative of Zambia Union of Nurses Organisation #1, interview, July 2014; Representative of National Union of Public Service Workers, interview, July 2014.

⁶¹ Union representative, interview, July 2014; Former UTH nurse #1, interview, July 2014.

⁶² Representative of Zambia Union of Nurses Organisation #1, Lusaka July 2014; Representative of Zambia National Union of Health and Allied Workers, interview, July 2014.

⁶³ Former UTH nurse #1, interview, July 2014; Former UTH nurse #2, interview, July 2014.

issue for nurses because the taxation structure meant that the net take-home pay was less under the actual breakdown than it would have been if the 21% were a pure wage increase.⁶⁴ Furthermore, Zambian law dictates that public servants' allowances can be lowered, whereas base salary cannot, meaning nurses felt that this arrangement was more precarious than an increase only to basic salary would have been⁶⁵. Thus, the 4% wage increment provoked animosity towards unions because nurses felt their unions had cheated and lied to them, creating further distrust that made it harder for union leaders to quell the strikes.

A general lack of communication between unions and their members has further adverse effects on the union's ability to protect worker interests. While some union leaders claimed that they request worker demands prior to bargaining in order to represent those demands at the bargaining table, many workers insisted that they were not kept abreast about developments during the negotiations. Infrequent meetings and an overall lack of sharing information after the negotiations, whether this is the result of apathy from the union or external constraints preventing more effective communication, cultivated animosity between nurses and their unions⁶⁶. Nurses were less likely to listen to the advice of their union representatives. Since workers lost faith in their unions' ability to enforce their demands they resorted to striking despite union objections⁶⁷. This made it more difficult for unions to protect workers from unemployment.

The relationship between union leaders and their members is affected by this strained communication, which further diminishes union influence. A gap in trust between both groups exists, which adversely affects how well unions can protect their members from unemployment. The fact that nurses struck despite unions' objections highlights a lack of trust in their unions, as the unions had allegedly failed to communicate the outcome of the 2013 agreement. Nurses tend to perceive their unions more as a business or a government apparatus than as an advocate for them. One nurse who was fired during the strike even speculated that her union was bribed by the government to remain idle during the firings. Symbolically, she no longer wears her union's badge even though she had before, even after being offered the chance to reapply⁶⁸. Union leaders also recognise the distrust between unions and members. Some union leaders claim that certain unions are primarily focused on maximising revenue from members' dues and no longer represent the voice of their members, meaning that there is a lack of motivation to bargain for what is best for members. As a result, members are no longer interested in working to improve the union⁶⁹. The prevalence of trust issues has harmful effects on the unions' bargaining leverage because the government sees union leaders as incapable of controlling or representing their own membership. This makes the government less willing to take unions seriously in negotiations. This also hinders unions' ability to protect workers from unemployment, as unions again do not have the strength and support necessary to override the governments' decisions.

Finances

Interviews with government representatives revealed how their financial constraints limit what unions can get in the way of wages and benefits. The Ministry of Finance sets parameters for

⁶⁴ Former UTH nurse #1, interview, July 2014.

⁶⁵ Two representatives of Civil Servants and Allied Workers Union of Zambia, interview, July 2014; Representative of Zambia National Union of Health and Allied Workers, interview, July 2014.

⁶⁶ Former UTH nurse #1, interview, July 2014; Former UTH nurse #2, interview, July 2014.

⁶⁷ Representative from the UTH Department of Medicine, interview, June 2014; Union representative, Livingstone, July 2014; Former UTH nurse #1, interview, July 2014.

⁶⁸ Former UTH Nurse #1, interview, July 2014.

⁶⁹ Representative of Health Workers Union of Zambia, July 2014, Lusaka

negotiations that are based on the economic performance of the country. If the economy is struggling based on their metrics, margins for concessions become slim⁷⁰. Other financial interests can also limit concessions. For example, the government is aiming to purchase a \$1 Eurobond. To build credit for this, it decided to limit the number of concessions it made during negotiations, leading to the imposition of a two-year wage freeze to seem more developmentally-minded. Additionally, the government was under pressure from the international players like the IMF and the World Bank to diversify spending habits, which also contributed to a desire to send the message that Zambia is working to become more fiscally responsible as it looks to purchase this Eurobond⁷¹. The fact that unions sometimes resort to sharing ideas on how to broaden the tax base and generate revenue⁷², which is outside their area of expertise, shows their desperation to overcome the limits on what unions can gain in bargaining set by the government's financial limitations. Furthermore, the government is able to concretise their parameters because they pass annual national budgets before negotiating with unions that set ceilings for total possible concessions⁷³.

Union finances also affect their influence. Because all workers in the public sector are covered by the same terms of service regardless of union membership status, free riding, or benefiting from union negotiations without contributing to the union financially, is a sizeable problem⁷⁴. The government was able to leverage unions' resulting financial desperation, which left them no choice but to rely on the government to pay for hosting negotiations. The government paid for accommodations for everyone involved during the 2013 negotiations in Siavonga. This meant that the government was able to decide when to hold negotiations. They scheduled them within a few weeks of the previous Collective Agreement expiring. If unions let it expire, their members would either go without pay or be paid by unions, which unions cannot afford to sustain for long. This created desperation to reach an agreement before expiration, leading to unions agreeing to worse terms than they would have liked in order to reach any agreement at all⁷⁵. Furthermore, an inability to pay means unions were unable to help fired nurses except in the most economically challenging cases⁷⁶, so nurses now see just how much they have to lose and are now less willing to put themselves in harm's way⁷⁷. This lowers strike leverage and therefore bargaining outcomes, as the government would be more motivated to make concessions to avoid strikes if unions' strike leverage were higher⁷⁸. In these ways, unions' limited finances lowered their influence.

The Law, Courts, and Norms

Labour laws affect the level of influence unions have in wage negotiations by facilitating splintering. The Industrial and Labour Relations Act, for example, allows for the proliferation of unions in a single industry, as it takes only 100 workers to form a union. Although mandatory union provisions of the Act often go unenforced, it still facilitates significant splintering⁷⁹. So-

⁷⁰ Representative of the Ministry of Finance #1, interview, June 2014; Representative of the Ministry of Finance #2, interview, June 2014.

⁷¹ Representative of the Ministry of Finance #2, interview, June 2014.

⁷² Representative of Health Workers Union of Zambia, interview, June 2014.

⁷³ Representative of Ministry of Finance #2, interview, June 2014.

⁷⁴ Representative of National Union of Public Service Workers, interview, June 2014; Representative of Health Workers Union of Zambia, interview, June 2014.

⁷⁵ Representative of Zambia National Union of Health and Allied Workers, interview, July 2014.

⁷⁶ Two representatives of Civil Servants and Allied Workers Union of Zambia, interview, July 2014.

⁷⁷ Former UTH nurse #2, interview, July 2014.

⁷⁸ Representative of the Ministry of Finance #2, interview, June 2014; Representative of Health Workers Union of Zambia, interview, July 2014.

⁷⁹ University of Zambia labour law expert, interview, July 2014.

called 'splinter unions' end up competing with other unions for bargaining power and dominance in the industry. Assuming wage negotiations are zero-sum, splinter unions can hinder the ability of other unions to gain higher wages and benefits⁸⁰.

Strike leverage is also affected by the Act. It stipulates that any strike is considered illegal until a long list of dispute resolution alternatives is exhausted. On the one hand, this law helps maintain industrial peace by disincentivising strikes⁸¹. On the other hand, it makes striking for immediate results virtually impossible⁸². What is more, workers in 'essential services', including UTH nurses, can engage only in illegal strikes because the law bars such workers from striking legally. This is risky because the government reserves the right to enforce summary dismissal, an expedited discharge meant to protect public interests by firing any worker acting outside the law without the warnings that would otherwise be required⁸³. This makes it difficult for a union to protect members from unemployment. Admittedly, despite what the law says, the Industrial and Labour Relations Court has at times decided not to uphold such a firing when it deemed a strike reasonable⁸⁴. But such an outcome was not afforded to fired UTH nurses⁸⁵. This lowers strike leverage and hinders a union's ability to protect workers from unemployment.

The court system also plays a role in determining union influence. At times, the government makes unilateral decisions that affect workers' wages and benefits. For example, in 1998 the government announced a wage freeze. This meant that unions would not be able to bargain for higher wages the following year. The unions filed a lawsuit against the government alleging a violation of their collective bargaining rights given they were not consulted before the announcement. The Supreme Court ruled in favour of the unions, establishing the union's right to engage in discussions over wage levels⁸⁶. In October 2013, the government announced another unilateral wage freeze⁸⁷, which unions may challenge in court⁸⁸. If the freeze is found to be legal, then unions' influence will be constrained for the next two years as they will be unable to affect any changes to wages and benefits. If it is found to be illegal, then unions will have cemented a greater ability to influence decisions governing pay and benefits. In both cases, unions referred to the courts for protection after their influence was diminished. However, court cases are expensive and time consuming which may limit a union's ability to consult the courts for reinforcement when the government makes a unilateral decision affecting wages and benefits⁸⁹.

External Players

Actors outside unions and the government showed how they and other external players helped shape the parameters of government concessions. Human resource shortages in Zambia's health sector render each worker more essential to the public. This has the effect of protecting workers from permanent unemployment, especially in the absence of adequate replacements. Zambia's Millennium Development Goals (MDGs) require that the country increase the number

⁸⁰ Representative of the Ministry of Labour, interview, June 2014; Union representative, interview, July 2014; Representative from Zambia Union of Nurses Organisation #1, interview, July 2014.

⁸¹ Consultant to the JERG exercise, interview, June 2014.

⁸² Fashoyin, 2007.

⁸³ Expert on Zambian labour relations, interview, July 2014.

⁸⁴ Representative of the Ministry of Labour, interview, June 2014.

⁸⁵ Former UTH nurse #1, interview, July 2014; Former UTH nurse #2, interview, July 2014.

⁸⁶ *Council of the University of Zambia and Another v. Allied Workers Union*, no. 1 of 1999 (Zambian Supreme Court, 1 January 1999).

⁸⁷ Banda, 2013.

⁸⁸ 'Wage Freeze', 2014.

⁸⁹ Representative of Health Workers Union of Zambia, interview, July 2014.

of health workers in order to 'right-size' the industry⁹⁰. While the government initially fired hundreds of nurses at UTH, patients were discharged from the hospital without full recovery. Many crucial operations were postponed because they lacked capable, experienced staff⁹¹. To solve these issues and appease the public, the government insisted that UTH hire graduate students. Although this solution seemed viable at the time it proved ineffective for certain departments. Operating theatres, for example, normally employ highly trained nurses with years of technical experience, whereas graduate students are generalists. UTH was, therefore, forced to close its theatre ward for two months following the strike⁹². The shortage of labour in such a crucial sector forced a response from the government. There was an agreement to slowly rehire fired nurses. It is unclear how much influence the unions had in this decision, mostly because the rehiring decisions and processes were not publicised in mainstream media, but many doubt that unions had anything to do with the rehiring decision⁹³. Thus, while the essential and human resource-deficient nature of the health industry might have been leveraged by unions to protect workers from permanent unemployment, it also contributed to the government's quick firing of nurses.

Relatedly, the importance of the industry to the public also means that the government is more likely to cater to health workers' interests for political purposes. Nurses work directly with patients, many of who are seriously ill. This creates the image that nurses and doctors are saving Zambian lives, an image that is hard to ignore given the prevalence of health issues such as the HIV/AIDS epidemic. For many, this 'hero' imagery is more potent than it would be in other industries. For example, while teachers help educate Zambian children to become productive members of society, the image of misbehaving children is not, from a public perspective, as worrisome as the image of dying patients. For this reason, many believe that the nurses carry more political clout than teachers. A representative from the Ministry of Finance went so far as to speculate that if teachers were to strike, they would be fired immediately and permanently because their image is not as powerful as that of the nurses⁹⁴. Politicians are largely aware of this clout, so they often try to appear sympathetic to nurses publicly. Some even believe this clout also explains why the Minister of Labour visited UTH after the strike. There were probably concerns he genuinely wanted to address, but the meeting was also an opportunity to boost his public perception using an image to which the public assigns importance⁹⁵. One might expect unions to be able to leverage the political clout generated by the nature of the industry, and that may occur at times, but the fact that nurses got relatively small wage increases in 2013 and were fired for striking without concessions suggests that this political clout is not a controlling factor.

International bodies that are specifically interested in the health industry can restrict the actions of the government. Health donors, for example, expect to see improved health outcomes in Zambia. Such outcomes become increasingly difficult when nurses are laid off. Thus, the government, which may have preferred to keep nurses unemployed to prove its point, ultimately rehired nurses in part because of the political pressure of donors who wanted a significant return on their investment⁹⁶. Donors can therefore help unions protect some workers from unemployment. However, the fact that striking nurses were all fired suggests that this variable does not work very strongly to unions' advantage. On net, the influence of the public and other external players further worked to hinder union influence in this case.

⁹⁰ Former World Bank expert, interview, June 2014.

⁹¹ Representative of the University of Zambia School of Medicine, interview, June 2014.

⁹² Representative of UTH Department of Surgery, interview, June 2014.

⁹³ Former UTH nurse #1, interview, July 2014; Former World Bank expert, interview, June 2014.

⁹⁴ Representative of the Ministry of Finance #2, interview, June 2014.

⁹⁵ Two representatives of Civil Servants and Allied Workers Union of Zambia, interview, July 2014.

⁹⁶ Former World Bank expert, interview, June 2014.

Political Will

Political will stood out in many respondents' eyes as an especially influential factor in determining outcomes for unions. While all of the preceding variables have been shown to work against union influence, this stands out as a variable that has both increased and decreased union influence. The fact that political will is unique among these variables merits a discussion of what affects political will. While this is likely an incomplete list of factors, three main factors were identified in this case study: the ruling party's goals, public pressure, and donor pressure. The goals of the ruling party affected the political will of the government in two ways. For one, the party's stated objective of increasing money in people's pockets contributed to a willingness to allow the large wage increases seen in 2013. Their working class-focused campaign led to especially high expectations and pressure from public sector workers⁹⁷. Second, the government's goal of maintaining a sense of order led to the desire to fire nurses who were seen as acting out. Public pressure, particularly from voters who did not approve of the firing of nurses, shaped the political will that allowed some nurses to be rehired. Third, as noted, donor pressure, especially from donors who want to see positive results in Zambia's health sector, also pushed the government to want to rehire some nurses⁹⁸.

The numerous ways in which the political will of the government affected union influence in the case study prove illuminating. Political will can either enhance or undermine union influence in wage negotiations. The Patriotic Front (PF) administration ran on the motto that they would increase money in people's pockets. This motto informed their approach to public sector pay in 2013⁹⁹. The government's minimum wage policy led to large increments for non-professional workers in 2013. It seems that these increments came about for reasons other than union power. The General Secretary of the National Union of Public Service Workers, which represents many non-professionals, even gave credit to the government, not his union, for generating such a large increment. His praise went as far as thanking the government for 'liberating' his members¹⁰⁰. This language reflects the power of government's political will over union outcomes.

The government's political will sometimes works against unions. The Ministry of Finance suggests certain limits on bargaining outcomes. Still, the government's bargaining team offered more than the Ministry of Finance wanted to in 2013¹⁰¹, showing diverging tendencies between the Ministry of Finance and central administration. Unions can leverage the political will of some branches of government to generate increases beyond what other branches would prefer.

The government's desire to win voters' support affects unions' ability to realise demands and protect workers. As a representative of the Ministry of Finance noted, 'No politician wants to cause a strike', as that would be unpopular with voters. Unions can presumably leverage this into increased strike leverage, especially when the ruling party takes as pro-worker lines as the PF administration has. Furthermore, the promises of wage increases and ultimate disregard for the Ministry of Finance's parameters during the 2013 negotiations were in large part an effort to attract favour with voters who benefit¹⁰². This meant that, instead of 'rightsizing' the civil service as had been recommended by experts, the government simply looked at raising

⁹⁷ Representative of the World Bank, interview, June 2014.

⁹⁸ Former World Bank expert, interview, June 2014.

⁹⁹ Sinyangwe, 2013.

¹⁰⁰ Chanda, 2013, para. 5.

¹⁰¹ Representative of the Ministry of Finance #2, interview, June 2014.

¹⁰² Ibid.

salaries¹⁰³, making it easier for unions to see their demands met. The Minister of Labour has been seen as 'aligned with unions against government' as a proponent of the new minimum wage that led to such large salary hikes in 2013. The political appeal of siding with unions is also visible during campaigns, when candidates all play to unions. Furthermore, the fact that opposition parties play to unions as often as they do indicates that there are advantages in appealing to unions¹⁰⁴, which again makes it easier for unions to receive what they want.

The political desire to appeal to unions and their members can lead to overstatements, promises, and a misleading framing of issues. For instance, the Minister of Labour promised to change perceived injustices that had led to the October strike, at least in part to appeal to nurses¹⁰⁵. This took the matter out of unions' hands, as nurses felt they had the government on their side, so they illegally struck despite union leaders' objections, making it harder for unions to win benefits and protect their members.

Furthermore, the government's ability to fire union leaders and other civil servants affects unions' ability to protect workers and bargain effectively. The government's will to instil a sense of order made them intent on sending a clear message that strikes are not tolerable. This desire was so strong that some innocent nurses were 'caught in the crossfire' and terminated¹⁰⁶. This makes it harder for unions to protect workers from unemployment as nurses were dismissed more or less indiscriminately to enforce the government's political will.

Discussion

The factors examined in this study mostly worked to the detriment of union influence in the case study examined. This raises questions regarding how to explain Zambia's large public service wage bill and the sizeable increases enjoyed by many civil servants after the 2013 negotiations. To explain this apparent inconsistency, one factor, political will, stands out as working heavily to unions' advantage in the cases when unions benefited most, such as the 2013 negotiations. Conversely, it was aligned against unions in cases where they were most defeated, such as the firing of UTH nurses. One can therefore infer that this factor has had a major impact on outcomes for unions.

While this is an important factor that determines the degree of influence unions have, it is a factor whose degree is determined primarily by the government, unlike the other factors. While it may be influenced by outside factors such as voter pressure or lobbying, the final decision of whether or not the government supports wage and benefit increases or protecting workers from unemployment ultimately lies with the government itself. This resolves the seeming paradox of unions seeing large increases in pay during the 2013 negotiations but being unable to stop the government from firing all striking nurses at UTH. It is not so much that unions were especially powerful in the former case and were less powerful in the latter case, but rather that political will was aligned with unions in the former case and against them in the latter case. It seems, then, that government is the institution that is best able to influence outcomes affecting unions. Outcomes that seem to speak to unions' strength are less a result of unions' strength than of political will. It is therefore fallacious to assume that, because outcomes in a certain case were in line with what unions wanted, that this imply that Zambian public sector unions are powerful. An alternate and more viable explanation would be that the government happened to

¹⁰³ Former World bank expert, interview, June 2014.

¹⁰⁴ Representative of the World Bank, interview, June 2014.

¹⁰⁵ Former UTH nurse #1, interview, July 2014; Union representative, interview, July 2014; Representative of UTH Department of Surgery, interview, June 2014.

¹⁰⁶ Representative of the UTH Department of Medicine, interview, June 2014.

support the same outcomes that unions did. Zambian public sector unions may therefore not be as powerful as they seemed.

This study encountered a number of limitations. First, logistical difficulties meant that the Public Service Management Division was not interviewed. As they are the employer for civil servants, this gap may mean that major trends and explanations were overlooked. Furthermore, because research was conducted within the span of only two months, other relevant stakeholders were not interviewed who could have contributed to this research. This study also focused on the Zambian public health sector to theorise about the Zambian civil service more broadly, but the nature of the health sector may present confounding variables that limit generalizability. Additionally, because this research took place in Lusaka, all interviewees came from Lusaka (except one union representative who was interviewed in Livingstone, but who works mainly in Lusaka), which may limit generalisability to regions outside Lusaka. Moreover, this case study focused on the strikes at UTH even though other hospitals in Lusaka and across the nation saw nurses strike as well, meaning some conclusions may not be generalizable to other hospitals. For these reasons, this study should not be treated as final and conclusive, but rather as a starting point for further investigations.

It is important to note that these findings are preliminary¹⁰⁷. Further research should examine other Zambian civil service sectors to determine the validity of these theories across contexts. These theories could also be quantified, perhaps with survey data, to determine if attitudes and trends suggested here hold true across larger populations. These theories could also be updated and adjusted as necessary in light of the outcomes future negotiations. Anything revealed by how future cases play out should be compared against these results and analyses, and conclusions should be updated as necessary.

That noted, these findings have implications for questions facing the labour movement, including Simutanyi's (2011) question as to whether unions should forge an alliance with the ruling political party or remain autonomous and lobby for a pro-worker agenda. As he noted, 'What strategy the labour movement will take will greatly depend on a strategic assessment of its relative strength and influence within the political process' (24). Findings that the labour movement, at least in the public sector, has been unable to recapture much influence in the early PF years may suggest that alliances with even seemingly pro-worker political parties may not be as fruitful as unions would like.

Questions of union influence clearly have implications for workers and unions. But, less directly, they also affect ongoing civil service reform efforts, as unions wielding influence can affect what the government can do. Assuming the validity of this study's conclusions, if reform is indeed being hampered, is the result of the government's behaviour more than unions wielding excessive influence. This affects how pro-reform advocates could best go about making changes that look to push reform efforts.

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¹⁰⁷ For a more thorough discussion of the limitations of this study, see Appendix A.

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